Quick Start Guide for City and Town Clerks:

Preparing Records for

Families Not Using a Funeral Home

Vitals Information Partnership (VIP)

Electronic Death Registration System (EDRS)

Revision August 28, 2014

Notes

Notes

Use this page to make notes about your own workflows and processes, which often differ by communities and facilities.

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Support

Accessing, navigating, registering and printing certified copies in EDRS are not covered in this guide. Please refer to the Quick Start Guide for City and Town Clerks: Registering Deaths. If you have questions, please feel free to contact the help desk team.

By email: vip@state.ma.us
By phone:
For technical problems using VIP or for enrollment help, call 617-740-2675.
For forms, data entry, or policy and procedure help, call 617-740-2674.
For forgotten usernames and passwords, call Virtual Gateway at 1-800-421-0938.

Summary of Steps

Note that this summary includes steps in typical scenarios and your own process may vary somewhat depending on the certifier/facility/burial agent workflow or the order and manner in which you receive information about a decedent.

1a	Obtain the Certifier Worksheet from the family designee, <u>if entering for an offline certifier</u>, or Pronouncement form, if applicable.
1b	Provide/obtain an Informant Worksheet from the family designee to collect the personal legal and demographic information about the decedent.
2	Create a New Case (Death→New Death→Create Case). This process will also find existing records that an online certifier or hospital may have started.
3	Enter Decedent Info (Tab 1)
4	Was the record started by an online certifier/facility, or was the certifier already assigned (check **Tab 9**)? If yes, skip to step 5. • If the certifier is known and <u>has not already been assigned</u>, go to **Tab 12** and select a certifier from the pick list. Do this ONLY ONCE unless changing certifiers. The certifier pick lists will revert back to "Select" once chosen, and you will delete the medical information if a new certifier is selected or same certifier is re-selected.
5	<u>If entering on behalf of an offline certifier</u>, enter tabs 6-9 (Medical Information) and tab 5A (Pronouncement info) if applicable, then **Finish,** and **Save (as Pending)** at the bottom of the VIPS Warning Page**.** • If medical information is complete, **Return to Record**, on tab 12 check **Ready to Certify**, Finish, Save, and **fax/print the Attestation Form**. • If you only have a pronouncement form, Finish, Save, and send a Preliminary Certifier Worksheet to obtain the medical information.
6	Enter tabs 1-5 (**Decedent's legal and personal information**). **Finish, Save**. This is a good time to print a **Fax Coversheet**, and fax in the pronouncement form, if any (but you may do this earlier, or at any point in the process, once a record is saved).
7	<u>If entering on behalf of an offline certifier</u>, upon receipt of the **Attestation form**, retrieve record through the menu path Death→New Death→Update. On tab 12 check **Ready to Certify**, then enter certifier **date signed** in tab 9, and click the **Certify** button on tab 12. **Finish, Save.**
8	If all information is complete, on the **Successful Transaction** page, print an **Informant Verification** form so that the information entered can be reviewed by the Clerk and informant.
9	Retrieve record (Death→New Death→Update), enter **Verification form date signed** or check the box if you are not using the Verification form, and **Check when ready for review before releasing.**
10	If ready to submit to Burial Agent (all fields must be complete), click the **Release** button, then **Finish**.

Summary of Steps

Overview

11	It is recommended that family designees obtain the burial permit directly from the burial agent, such that their plans for disposition are approved. However, if you will be printing the permit for the family designee, print a permit from the menu (Death→Print→Permits). • If a community is "opt-in," you may print immediately after releasing. • If a community is "opt-out," print after the burial agent enters permit info.
12	Once the record is released by the burial agent for registration, you may register and print archival and certified copies.

Overview

This quick start guide is intended to assist City and Town Clerks with the basic steps for assisting families that are caring for their own dead. Using the Vitals Information Partnership (VIP) electronic death registration system (EDRS), City and Town Clerks will enter information about the decedent, enter medical information for offline certifiers/facilities, and release to the burial agent. Registering and printing archival and certified copies is not covered in this guide.

If family members have questions about preparation and disposition of remains, you may refer them to the Department of Public Health, Division of Community Sanitation. Handy web links include:

http://www.mass.gov/eohhs/gov/departments/dph/programs/environmental-health/comm-sanitation/faq-regarding-the-issuance-of-burial-permits.html

http://www.mass.gov/eohhs/gov/departments/dph/programs/environmental-health/comm-sanitation/burial-and-cremation.html#burial (This web page is in the process of being updated for EDRS changes).

Changes with Electronic Death Record System (EDRS)

- EDRS enables multiple stakeholders (physicians, nurse practitioners, medical data entry staff, burial agents, and others) to enter information online about a decedent's case. In cases where families are caring for their own dead, the City or Town Clerk will facilitate and enter the death record.
- While most stakeholders will access EDRS, some medical certifiers (physicians and nurse practitioners) will not use EDRS but instead use a more process commonly known as "fax attestation." Therefore, you will work both with medical certifiers who are "offline" and those who are "online" using EDRS. For other designee cases, offline certifiers will rely on City and Town Clerks to enter data from a worksheet into EDRS. Workflows will differ by facility and practice, and will change over time as more certifiers and facilities move to electronic certification.
- For other designee records, Clerks will submit EDRS records to burial agents. It is recommended that family designees obtain the permit directly from the burial agent, so that disposition plans may be reviewed. However, the permits can be printed at your office. Some towns will also allow "e-permits" that will allow printing of a permit as soon as a record is complete and released to the burial agent ("opt-in").

Forms

Below is a brief description of the forms you may encounter. Not all forms are needed for each case.

Death Certificate Certifier Worksheet ("Certifier Worksheet")

Offline certifiers (certifiers that do not log in to EDRS directly) will use this form to provide medical information for data entry into EDRS. This form will be provided to online medical data entry staff, if available, or to you by the family designee. This will vary by facility or practice. If it is provided to you, you will enter the medical information into EDRS. (This form may optionally be attached to the electronic record by using an EDRS fax cover sheet).

Death Certificate Attestation Form ("Attestation Form", "Fax Attestation")

Once medical information is entered into EDRS on behalf of an offline certifier, the EDRS system will generate an Attestation Form. The form may be automatically faxed by the system to the certifier's fax number, or printed. The delivery method will depend on facility/practice/municipality internal workflows, but it is recommended that the Clerk use the fax process or otherwise personally provide to the certifier to ensure an authorized signature. The certifier must review this form and attest that the information was entered correctly into EDRS. This barcoded form must be attached to the electronic record by faxing to the number on the form, which is an automated imaging system (not a physical fax machine). A PDF image of the form will then be available on the Records Details preview pages of the EDRS record.

Death Certificate Attestation Copy Form ("Attestation Form", "Fax Attestation")

Once medical information is certified in EDRS, users may generate an Attestation Copy Form. This form may be provided to family designees for transportation of the decedent when a medical facility has certified the record. Clerks may print this form for family designees to provide to the crematories in support of cremation, instead of a copy of the paper death certificate.

Preliminary Death Certificate Medical Certifier Worksheet ("Preliminary Worksheet")

This form is generated by EDRS for online medical staff and Clerks working with family designees to provide a partially-completed worksheet to offline certifiers. A typical use is when the designee receives a nurse pronouncement form and the Clerk starts a record in EDRS with this information. The form may be faxed by the system to the certifier's fax number or printed and delivered by the designee. The certifier will complete the remaining items for data entry on this form, and fax it (or deliver it) to the Clerk. The form is uniquely barcoded, and does not require an EDRS fax cover sheet. If faxed, a PDF image is automatically attached to the EDRS record. After the remaining data entry, the process is completed by sending an Attestation Form, as described above.
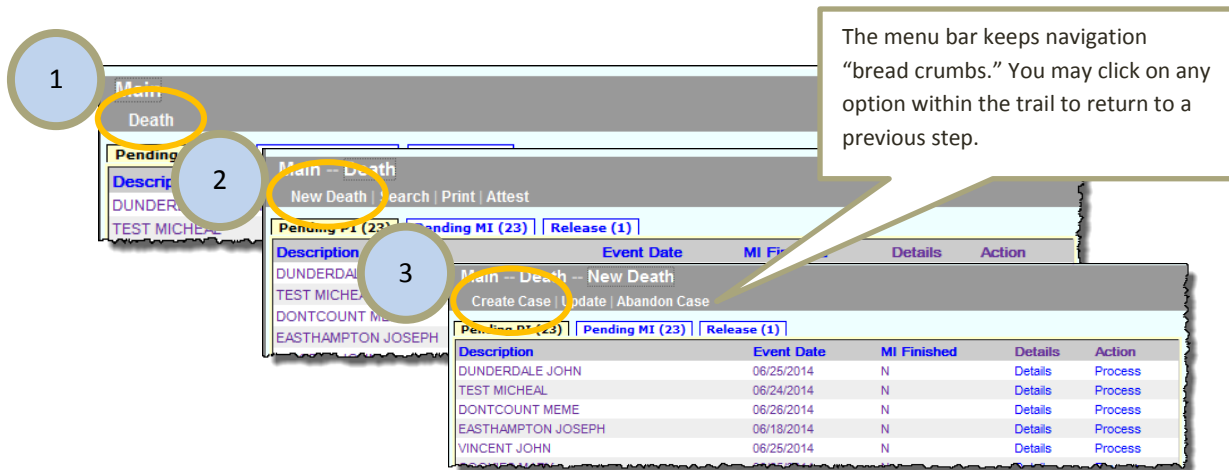
Informant Worksheet

The Registry provides an Informant Worksheet for use by family designees either on paper or as a form-fillable PDF. This form is optional, but because it contaisn all personal data items in the correct format for entry into EDRS, it is highly recommended that you ask family designees to provide decedent information on this form.

Create or Accept a New Case

Create a New Case (or Accept an Existing Case)

If the Clerk is starting a record, entering on behalf of a fax attestation certifier, or if the Clerk needs to claim a case that was started by an online certifier (or by medical staff), the first step will be to create a case. The gray bar in VIP is a menu bar. Click on **Death** to access VIP menu options. To create a new case, click on **Death**, then **New Death**, then **Create Case**.

The menu bar keeps navigation "bread crumbs." You may click on any option within the trail to return to a previous step.

Main
Death

Main -- Death
New Death | Search | Print | Attest

Description	Event Date	MI Finished	Details	Action
DUNDERDALE JOHN	06/25/2014	N	Details	Process
TEST MICHEAL	06/24/2014	N	Details	Process
DONTCOUNT MEME	06/26/2014	N	Details	Process
EASTHAMPTON JOSEPH	06/18/2014	N	Details	Process
VINCENT JOHN	06/25/2014	N	Details	Process

Main -- Death -- New Death
Create Case | Update | Abandon Case

To begin a record you will need Decedent's First and Last Name, Sex, Date of Death and Date of Birth. If you are searching for a record that was started by an online certifier, be sure to enter the information exactly as it appears (even if it is not correct) on the attestation copy form (the form that will usually be given to the family designee for transport). Enter this information into each field, then press **Search**.

Main -- Death -- New Death -- Create C...

Start Death Record
Decedent's Name
First SALLY
Last BROWN
☐ Soundex on last name
Decedent's Sex
Sex FEMALE ▾

Enter dates as MMDDYYYY or MM/DD/YYYY. For most date fields, "9"s are acceptable for unknown portions. E.g., 03991961 indicates unknown day.

Date of Death
Date of death (mm/dd/yyyy) 04/01/2014
Date of Birth
Date of birth (mm/dd/yyyy) 04/01/1994

[Search] [Cancel]

When you start a new record in EDRS, the system runs a check to see if the record may have been started by another user, such as an online certifier, medical data entry staff from a hospital, nursing home or other healthcare facility. The system will then display potential matches.

Depending on whether a match is found, these are examples of two possible resulting screens and the typical actions that you will take:

Create or Accept a New Case

- *If no matching records are found*, you can begin the process of establishing a new record by choosing **Create New Case**.
- *If a match is found,* you m ay choose to **Accept** under the heading Action for FH (as the Clerk is acting in the EDRS funeral home role). Selecting **Accept** will bring you the **Record Details** where you can review information on the record to ensure this is your record. If the record is not the record you were looking for, select **Cancel** at the bottom of the **Record Details** page.
- *If the record is assigned to a funeral home*, "owned by another location" will be displayed in the Action for FH heading. Unfortunately, in the 4.2x version of EDRS, a funeral home cannot re-assign the case to a family designee (this will be a future enhancement). The record will need to be started new.
- *If the resulting match is a different decedent*, then choose **Create New Case**.

If a record was already started, upon clicking **Accept** (or **Process** from within a queue), you will be able to preview information already entered and view any attached documents.

At the bottom of each tab on the Records Details, you will find a button to continue to the record, or to **Cancel** without making changes to the record.

Decedent Information

Entering Decedent Information

All authorized users may view all information "tabs" in a death record and will be brought to **Tab 1** initially. You must complete tab 1 before moving on to other tabs.

Under **Tabs 1 – 4** you will enter information about the decedent, including legal and personal information, normally provided by an informant. **Tab 5** collects information about the family designee and disposition information.

When entering medical information for an offline certifier, you will also complete **Tabs 6-9**. **Tab 12** is used both to assign a certifier, when appropriate, and as a final step for verification of the record as complete and ready for release to a burial agent.

> Clerks will always complete **Tabs 1-5 and 12**, and if entering on behalf of a certifier, will also complete **Tabs 6-9.**

Death -- First name:*SALLY* Last name:*BROWN* Date of death

| 1 Decedent Info | 2 Decedent Legal Info | 3 Decedent History | 4 Informant | 5 Funeral Home/Disposition Info |
| 6 **Place/Date/Autopsy** | 7 **Certifier Cause of Death** | 8 **Manner/Detail/Injury** | 9 **Certification Info** | 12 Record Actions |

Decedent's Name
First name: SALLY

Date of Death
Date of death (mm/dd/yyyy) 04/01/2014

Tab 1 & 1A. Decedent Information

An Informant Worksheet is available from the RVRS. Clerks are advised to use this worksheet to accurately collect the personal information about the decedent. If communities choose to devise their own worksheets, then fields and appropriate responses must match the items on the death certificate.

Hidden tabs are enabled only when necessary. For example, if "How Many Aliases?" is more than zero, **Tab 1A** will appear after you click **NEXT** to move on to the next tab. Here you may enter up to 4 different Aliases/AKAs for the decedent.

Selected Field Notes:

Name of Decedent	Enter the full legal name as provided by the informant. Generational ID is a name suffix, such as "Jr." Surname at birth or adoption is required of all decedents, male or female, and is commonly known as "maiden" surname. If there is no middle name, check the "No middle name" checkbox, or enter three dashes (---).
How many aliases?	If the decedent had aliases ("Also Known As" or "AKA" names), enter the number of names you would like to add. A new tab will be enabled that will allow you to enter those names.
Social Security #	Enter as NNNNNNNNN. If a SSN is not known, enter 999999999 and provide a reason from the pick list. When EDRS is linked to the SSA verification system, saving the record will transmit the information to and from SSA. The verification status will only appear after a save and return to the record.
Age Measure & Age	Enter a measure first (e.g. "Years," "Months/Days," "Hours/Minutes"), then enter the units of age in the appropriate category(-ies). EDRS does not autopopulate the calculated age, but will verify that date of birth is valid for age and date of death.

Field	Description
Pronouncement performed	This field refers to the manual RN/PA/NP pronouncement form that the family designee may receive, typically in deaths that occur in a residence or nursing home. If yes, a new tab will be enabled to enter pronouncement form information. Online pronouncement for RNs, PAs and NPs is not a current EDRS feature, but some long term facilities will be piloting. Pilot sites will print a preliminary worksheet in lieu of the pronouncement form, and the record will have been started in EDRS.

Note: While this guide presents the tabs in order, you may prefer to jump to tab 12 at this point to assign the medical certifier right away, so that the rest of the data entry will follow in order. Otherwise, selecting an offline medical certifier will need to be done before completing tab 6.

Tab 2. Decedent Legal Information

You may use the Informant Worksheet or other sources that you have on hand to enter in details about the decedent's **Birthplace**, **Marital Info**, **Residential Address**, **Veteran Status**, **Last Spouse's Info**, **Father/Parent Info**, and or **Mother/Parent Information**.

EDRS will enable or disable certain fields depending on the responses given. Use "unknown" only if absolutely necessary, as the death certificate is a permanent legal and informational document that has value to subsequent generations of family members in addition to its immediate legal value.

If the informant needs to research items, they should be encouraged to do so within timeframes that allow for the preparation of the record in advance of disposition.

Decedent Legal Information

Death – First name: *LUCILLE* **Last name:** *BROWN* **Date of death (mm/dd/yyyy):** *05/05/2014*

| 1 Decedent Info | 1A Alias/AKA | 2 Decedent Legal Info | 3 Decedent History | 4 Informant | 5 Funeral Home/Disposition Info | 5A Pronouncement Info | 6 **Place/Date/Autopsy** | 7 **Certifier Cause of Death** | 8 **Manner/Detail/Injury** | 9 **Certification Info** | 12 Record Actions |

Birthplace
- Country: Select
- State/province:
- Cities/towns: UNITED STATES
- City/town:

(drop-down list shown:)
Select, CANADA, UNITED STATES, AFGHANISTAN, AKROTIRI, ALBANIA, ALGERIA, AMERICAN SAMOA, ANDORRA, ANGOLA, ANGUILLA, ANTARCTICA, ANTIGUA AND BARBUDA, ARGENTINA, ARMENIA, ARUBA, ASHMORE AND CARTIER ISLANDS, AUSTRALIA, AUSTRIA, AZERBAIJAN, BAHAMAS, THE, BAHRAIN, BAKER ISLAND, BANGLADESH, BARBADOS, BELARUS, BELGIUM, BELIZE, BENIN, BERMUDA

Marital Info
- Marital status

Decedent's
- Address number
- Street prefix
- Street name
- Street designator
- Street suffix
- Apt./unit number
- Country
- State/province
- Zip code list
- Cities/towns
- City/town
- Counties
- County
- Zip code
- Inside city limits? Select

Veteran Status
- Is decedent a US veteran? Se...

Last Spouse's Info
- Name unknown

Shortcut: Both UNITED STATES and MASSACHUSETTS are listed at the top of the long drop-down lists, eliminating the need to scroll down. Type "U" or "M" and

Death – First name: *LUCILLE* **Last name:** *BROWN* **Date of death (mm/dd/yyyy):** *05/05/2014*

| 1 Decedent Info | 1A Alias/AKA | 2 Decedent Legal Info | 3 Decedent History | 4 Informant | 5 Funeral Home/Disposition In... | 5A Pronouncement Info | 6 **Place/Date/Autopsy** | 7 **Certifier Cause of Death** | 8 **Manner/Detail/I...** | 9 **Certification Info** | 12 Record Actions |

Birthplace
- Country: UNITED STATES
- State/province: MASSACHUSETTS
- Cities/towns: ATTLEBORO
- City/town: ATTLEBORO

Marital Info
- Marital status: Select

(drop-down list shown:)
Select, MARRIED, MARRIED BUT SEPARATED, WIDOWED, DIVORCED, NEVER MARRIED, UNKNOWN

Decedent's
- Address number
- Street prefix
- Street name
- Street designator: Select
- Street suffix: Select
- Apt./unit number
- Country: UNITED STATES
- State/province: Select
- Zip code list: Select
- Cities/towns: Select
- City/town
- Counties: Select
- County
- Zip code
- Inside city limits? Select

Veteran Status
- Is decedent a US veteran? Select

EDRS enables and disables fields depending on the response to previous fields. For instance, choosing "never married" disables Last Spouse's Info.

Last Spouse's Info
- (Name) unknown

Current Info
- (Name) unknown
- (First) name
- (Middle) name
- Last name

- Generational ID
- Surname at birth or adoption
- Country of birth: Select
- State/province of birth: Select

[Finish] [Cancel]

Enter a few letters or numbers to quickly select from a pick list, then [tab] to the next field. *Tip*: wait a second to let the field populate before pressing [tab].

Tip: Depending on your computer's display, you may need to scroll down to this field. It can be easy to

Selected Field Notes:

Birthplace	Each pick list will help to narrow the choices in subsequent lists. For United States, type U, [Tab] wait for the state list to populate, then type M, and [Tab] to rapidly enter Massachusetts. For other choices, enter the first few letters to quickly skip to the correct entry or scroll through the pick list. State/Province is required for U.S., Canada and Mexico. For non-U.S. states, enter the country and city/town (or other legal jurisdiction that maintains the decedent's birth certificate).
Marital Status	The choice you make in the Marital Status drop-down list will determine if the Last Spouse Info fields on the right hand side of the page are enabled or disabled.
Residence	Enter the decedent's last legal residence address. Each element of the address is parsed for precise geographical coding. For instance, "Main Street South" is entered into three different fields. State/Province is required for U.S., Canada and Mexico. The zip code list is available for Massachusetts and several New England states, and will narrow the subsequent pick lists to proper cities and towns.
Veteran Status	Answer Y or N to "Was decedent a U.S. veteran?" Note that this field is no longer limited to "war" veteran. If yes, then a new tab will be enabled to enter veteran information.
Last Spouse	If marital status is anything other than "never married," you will enter the information for the last known spouse: legal first and last name and surname at birth or adoption, which is required for both males and females (formerly "maiden" surname). Enter middle name if known.

Parents	For each parent, enter the legal first and last names, as well as the surname at birth or adoption, which is required for both males and females (formerly "maiden" surname). Enter middle name if known. Labels on the death certificate are Mother/Parent and Father/Parent for all parents, regardless of sex of parent.

Tab 2A. Veteran Status

This tab is usually hidden. Only if you select "YES" to the veteran status question on **Tab 2**, will **Tab 2A** be enabled for editing.

You may enter up to three (3) different war/branch of military combinations for the decedent. Enter all information available

to you. At minimum, you must enter "**War**" (which also includes a selection for "Peacetime") and **Branch of military**, although more detail should be specified when available. The most recent war (the one listed first) will appear on the front of the death certificate, and the additional information will appear on the reverse of the death certificate (which is now normally included as part of a certified copy).

Selected Field Notes:

War	Select the most recent war in which the decedent served as a U.S. veteran from the pick-list. If the veteran was a peacetime veteran, choose "Peacetime." If the conflict is not listed, you may choose "Other" and specify. This field and Branch of Service are the only two required fields for veterans.
Branch of Service	Select the most recent U.S. branch of service in which the veteran served. This field and "War" are the only two required fields for veterans.
Rank/Organization/Outfit	Enter the rank that corresponds to the war entry. If there were more than one rank achieved, enter the highest rank. You may also add any additional information about the veteran's military organization, detail or outfit.
Date Entered/ Date Discharged	Enter in MMDDYYYY format. If any portion of the date is unknown, enter 9s. E.g., for unknown month and day, enter 99991965; for unknown day, enter 03991965.

Decedent History

Tab 3. Decedent History

You must check at least one (1) selection in both the **Decedent's Ethnicity** and **Decedent's Race** sections, but more than one selection can be made in each column, if applicable. This conforms to national standards that allow for reporting of multiple races and ethnicities. Because it is possible that multiple races will not fit neatly on the death certificate, an additional field, **Decedent's Death Certificate Race**, is required such that the informant may specify how they would like the race to print on the front of the death certificate. All other race and ethnicity information will appear on the reverse of the death certificate.

Selected Field Notes:

Decedent's Ethnicity and Race	In each of these fields, mark at least one entry, but multiple races and ethnicities may be selected to conform with national standards of reporting. The races and ethnicities selected in these fields will appear on the reverse of the death certificate.
Decedent's Certificate Race	Because multiple races may not neatly fit on the face of the death certificate, this field captures the race(s) that the informant would like printed on the face of the death certificate.
Decedent's Occupation and Industry	Enter detail about the decedent's latest occupation and industry. Do not enter "retired" or "not working." Enter "Retired Mechanical Engineer" or "State K-9 Police Officer." You may refer to this handbook if you need guidance on entering occupation and industry: http://www.cdc.gov/niosh/docs/2012-149/pdfs/2012-149.pdf.
Decedent's Education	This field is a pick-list to choose a category that best represents the decedent's level of education. If the decedent was not educated in the United States, ask the informant to select the category that most closely reflects the educational level achieved.

Tab 4. Informant

An informant is the individual that provided the legal and personal information about the decedent. An informant worksheet is available from the Registry for use by family designees. Use of the worksheet is not required, but it can help to capture the information in the new death certificate format. Enter this information in **Tab 4**:

Note that if the **Informant Mailing Address** is the same as the decedent's address entered on **Tab 2**, then you will check the box for **Address same as decedent's residence**, which is located above the mailing address. The address fields will populate automatically. If the address of the informant is different, fill out the fields with the address information.

Selected Field Notes:

Name of Informant	Enter the current name of the informant. Generational ID is a name suffix, such as "Jr." If there is no middle name, check the "No middle name" box, or enter three dashes (---).
Relationship to Decedent	The pick list contains many of the most common types of relationships; but, if there is a relationship not on the list, you may choose other and specify in the free text field.
Address	Enter the informant's mailing address. As with decedent's address, each element is parsed. For instance, "Main Street South" is entered into three different fields. State/Province is required for U.S., Canada and Mexico. The zip code list is available for Massachusetts and several New England states, and will narrow the subsequent pick lists to proper cities and towns. A post office box is acceptable for informant's address.

Funeral Home (Family Designee)/ Disposition Info

Tab 5. Funeral Home/Disposition Info

This tab will be used to capture information about the **other designee**, **Method of Disposition** and associated **Place of Disposition**.

Selected Field Notes:

Name/Address of Designee	Enter the name of the family designee and their address.
Check if other designee	This field is currently inactive. Ignore.
Licensee/ Designee	This field is required because funeral homes are required to list a Type 3 funeral director; but in the case of an "other designee," enter the name of the family designee again. In the License number field, enter the relationship to the decedent.
Trade Service Call	You will not use this field. This field is used when an online funeral home is entering information on behalf of an offline funeral home.
Method of Disposition	Indicate the immediate disposition of the decedent. Note that if "Donation" is marked, you will need to check "facility not in list" to add the name and address of the donation facility. (This is flagged for a future EDRS enhancement). If not in list, check "Other" and type in an appropriate disposition (e.g., "Holding").
Date of Disposition	This should be the date of the expected immediate disposition. Enter as MMDDYYYY. If "holding" enter the date released to the burial agent or the date the decedent is moved to the holding facility (do not enter a date prior to release to the burial agent, else a permit cannot be issued).
Address of facility	This is pre-populated if a location is chosen from Cemetery or Crematory pick-lists. Check "Facility not in list" and manually enter the address if the place of immediate disposition is not in the pick list, or if the disposition is "Donation" or "Other." Enter the physical location, not a mailing address.

Tab 5A. Pronouncement Info

The family designee will receive a paper Pronouncement form ("nurse pronouncement") when a nurse, physician assistant, or nurse practitioner (who is not certifying the death) pronounces death in certain circumstances where a physician or medical examiner is not available -- common in deaths that occur with home hospice and in nursing homes.

Note: You may start a record for medical certification with just a pronouncement form. It is fine to enter just Tab 1, Tab 5A, and, optionally, Tab 12 (Records Actions) to assign a certifier, and save the remaining data entry for later. This will allow an online certifier to find the record and complete the medical certification while you gather other information from the informant. You should fax the nurse pronouncement form into the system for the certifier to view (see fax instructions in the Attaching Documents section, later in this guide). EDRS also allows you to fax or print a Preliminary Certifier Worksheet, to provide an offline certifier with the information already entered on the record, including pronouncement information.

Tab 5A is only enabled for editing if you selected "Y" in the pronouncement performed field (on **Tab 1).** Enter all required information from the form, including the **Physician/ME Notified of Death.** The drop-down list is pre-populated with the names of physicians and medical examiners.

Prior to releasing this record to the burial agent (if not sooner), you will fax this form with a VIP fax cover sheet which will attach a scanned image to the record. Original pronouncement forms will no longer be sent to RVRS. Instead, keep the original in your case file for the decedent or with your archival copy of the record.

Records Actions, Part I: Assign Medical Certifier

Tab 12. Records Actions, Part 1: *Assign Medical Certifier*

Offline Certifier - If you are working with an offline certifier, and have not already designated the certifier on tab 12, you will need to do so before you can enter information into **tabs 6-9** (medical information and certification). You may also perform this step any time after completing **tab 1**.

Online Certifier - If you are working with an online certifier that has not already started or accessed this record, you may assign that certifier to the record. The record would then appear in the certifier's **Pending MI** queue.

If you are not sure who will be certifying, wait. An online certifier will not be able to update a record that has been assigned to a different certifier; you (or medical data entry staff, if applicable) would need to reassign the certifier. If you do not assign an online certifier, that certifier will still be able to find the record when he/she goes through **Create New Case**.

Note: If this is a medical examiner case, you will <u>not</u> assign a medical examiner, and you should not start the record.

Enter helpful comments, if appropriate.

Select the name of the physician or nurse practitioner certifier from the pre-populated list.

If you are working with an offline certifier, you will <u>later</u> return to this screen when the record is complete and ready to certify.

Important Note: Select the certifier ONLY ONCE unless changing certifiers. The certifier pick lists will revert back to "Select" once chosen, and will delete the medical information on tabs 6 through 9 if a new certifier is selected or same certifier is re-selected.

If the medical certifier is not on the list - Mark the checkbox **Certifier not in list**, which will enable the name and address fields for data entry in **Tab 9 (Certification Info)**.

Tab 6. Place/Date/Autopsy

Clerks will complete **Tabs 6-9** only when the medical certifier is **offline** and the certifier's facility or practice does not have online medical data entry staff. In this case, you will obtain the facts of death necessary to complete these tabs by obtaining the **Death Certificate Medical Certifier Worksheet** ("Certifier Worksheet") provided to the family designee, or other method of information transmittal. You will then enter the information provided into the EDRS.

In **Tab 6**, the name and dates of birth and death will be pre-populated with information that was entered on **Tab 1**, from when the case was created. On this tab (**Tab 6**), you should enter the information about the place of death, whether the medical examiner was notified, and whether there was an autopsy. Select a **Place of Death** option to enter the type of location from the drop-down.

Certain selections in EDRS will cause other fields to become active. For example, if the decedent died in an emergency room, after you select "Hospital – ER/Outpatient" as place of death, the hospital drop-down list will become enabled for selection. EDRS provides lists of hospitals, hospice care facilities, nursing homes, assisted living or rest homes, eliminating the need to type the name and address (the address fields will become disabled).

Selected Field Notes:

Decedent's Name, DOB and DOD

When entering for an offline certifier, the decedent's name, dates of birth and death will be defaulted to the information entered into Tab 1. If an online certifier begins a record, these fields are disabled, and it might happen that the name is different than what you will enter as the correct legal name on Tab 1. Check that Tab 1 is accurate, as these will be the names that print on the death certificate. Certifiers may not always

Place/ Date/ Autopsy

have the correct legal names for their patients.

Check to Release	This field is always disabled and is for medical examiner use only.
Medical Record Info	Medical record number, medical examiner case year and case number are optional. If they were provided on the Certifier Worksheet, please enter this information.
Place of Death	Select a **Place of Death** option to enter the type of location where the death took place. Then, choose the specific facility from the drop-down list. For hospital and nursing home medical staff doing data entry, the facility name and address is defaulted. Note that "Decedent's residence" is to be used only for his/her own residence that is not a nursing home, hospice facility, assisted living or rest home. Home hospice may be entered as "Decedent's residence." Another person's residence should be marked "Other." • *Not on the list?* If the facility where the death took place is not listed in EDRS, you can use the option "Check if location is not in list" to enter in a new location. • *Residence?* For a death occurring at the decedent's own residence, the address fields are all open for editing. If you already entered address information in Tab 2, then you may check the "same as residence" checkbox to automatically populate residence address. • *Nursing Home/Assisted Living?* If a decedent was living at a nursing home, assisted living or rest home, do not choose "decedent's residence," but choose the appropriate facility type instead. Look for facilities in other facility types, if not found on the pick list. What you may think to be a nursing home may be licensed as assisted living. • *Hospice?* If the decedent was receiving home hospice care in his/her own home, choose "decedent's residence." This category should only be used for hospice facilities.
Autopsy Info	Answer **Was medical examiner contacted?** yes or no as it appears on the certifier worksheet. If the medical examiner was not contacted, but should have been, it is your responsibility to refer the case to the medical examiner; then select "Yes." Note that the system sends an error message when the place of death is not a medical facility; if this is not a death that requires medical examiner notification, simply click "OK." (This edit will be refined in a later EDRS update). **Was an autopsy performed?** - For records where you are entering information for an offline certifier, the appropriate response will usually be "Yes- Private" for any non-M.E. autopsy or "No." **Were autopsy findings available?** should be answered "Yes" if the certifier used the autopsy results to determine cause of death. Enter as it appears on the worksheet.
Actual Date of Death	Date of death will default to the information entered on Tab 1. Do not change this field, unless it was entered incorrectly when the record was started and you have double-checked the date with the certifier. Tab 1 should also be corrected in this case.
Place of Death Address	Choosing a facility from a drop-down list will automatically populate the address. Checking **Same as decedent's address** will automatically populate the address that was previously entered into Tab 2. If you need to enter a new address, note that the address component fields are separated for geocoding: e.g., "9 Main Street South" is entered into four different fields.

Questions? Contact the Registry of Vital Records and Statistics at vip@state.ma.us.

Tab 7. Certifier Cause of Death

These fields are enabled only if you are entering information on behalf of an offline certifier. If the certifier or medical facility staff members are online, then information about cause of death will be entered into EDRS for you.

Enter cause of death information as it appears on the Certifier Worksheet (or other means of information transmittal). The EDRS will prompt for abbreviations, rare causes, mechanistic causes and other potentially improper entries but will not prevent them in this release. Do try to spell out abbreviations when prompted. If certifiers have questions about proper completion of cause of death, note that the Massachusetts Medical Society is hosting a free online Cause of Death tutorial (http://www.massmed.org/cme/causeofdeath).

Manner/ Detail/ Injury (vertical sidebar text)

Selected Field Notes:

Cause of Death	List one cause per line, as provided by the certifier. Line (a) should list the immediate (final) condition directly causing death. Other lines list diseases or complications that gave rise to the immediate cause. If there are more conditions than lines, you may list more than one cause on lines (b)-(d) by writing "due to" between conditions.
Approximate Intervals	Enter an approximate interval for each condition listed in the cause of death sequence, as provided by the certifier. You may enter in many different ways depending on the information available to you. E.g., "8 minutes," ">10 years." A certifier *may* enter units without exact intervals when an estimate is not possible. E.g. "Years" (number of units is then left blank).
Other significant conditions	List other diseases and conditions that may have contributed to death, as provided by the certifier, in a continuous line with each condition separated by a semicolon (";"). If none, leave blank.

Tab 8. Manner/Detail/Injury

Non-medical examiner certifiers, and Clerks entering on behalf of an offline certifier, will complete just three questions on this tab. Use the information provided to you from the Certifier Worksheet (or other means of information transmittal) to fill out the information about **Manner of Death**, **Pregnancy Status**, and **Tobacco** exposure. Non-medical examiner certifiers will not complete death records for manners other than natural, and will not need to complete the injury information fields.

Selected Field Notes:

Manner	"Natural" manner of death is your only option. If a certifier indicates a manner other than natural, the case must be referred to the medical examiner.
Pregnancy Status	This is a new question to comply with the Centers for Disease Control and Prevention (CDC) national standard. The certifier will indicate whether a female, between 5 and 75, was pregnant at death or any time in the last year. Specific checkbox categories break down the pregnancy intervals to "at death," "within 42 days," and "43 days to one year."
Did tobacco contribute to death?	Also a new CDC question, this collects information about whether use or exposure to tobacco contributed, or may have contributed, to death. Possible answers are "Yes," "No," "Probably," and "Unknown."

Tab 9. Certification Info

For typical cases, you will enter only these items on behalf of an offline certifier: **Certifier Designation**, **Physician in Charge of Patient's Care**, **Hour of Death** and **Date Signed**. Other fields may be necessary depending on differing circumstances.

Certifier Name, Title, Fax Number, Address –

- *For Clerks (or medical data entry staff) entering on behalf of an offline certifier –* This information is populated from the certifier information that you selected in **tab 12** (**Records Actions** tab – see p. 18). If the Certifier is not on the list (or if the information is incorrect on the list) -- Mark the checkbox **Certifier not in list** on **tab 12**, which will enable the name and address fields for data entry. *Note*: If the updated information should be a permanent change to the pick list, also mark the checkbox **Update certifier info and flag for database change** on **tab 9** (Certification Info).

- *For online certifiers entering their own data*, EDRS will auto-populate name, title, license number, phone and fax number, and address. You will not enter or change this information.

If you enter a new certifier or edit an offline certifier's information, and this should be a permanent change to the pick list, mark the checkbox **Update certifier info and flag for database change.**

If the certifier does not know the primary provider, but the informant does; confer with the certifier whether to add it.

Certifiers may use military (24-hour) time. EDRS will convert this to AM/PM for printing on the death certificate.

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Certification Info

Finish and Save. After completing **Tab 9**, **Finish** and **Save (as Pending)**. You must finish and save prior to printing/sending an attestation form, entering date signed, and certifying on the Records Actions tab. Both steps are necessary before you may certify the record. (The VIP system needs to validate all screens before it determines that it is ready to certify.)

1. Click **Finish** at the bottom of the tab you are working on.

2. You will then review the **VIPS Warning page**. Prior to printing/faxing an attestation form, or certifying the record for an offline certifier, only three fields in the Medical Info section will and <u>should</u> still be "incomplete;" **Physician Certifying Info - date signed**, **Medical Info - Ready to certify**, and **Certify**. If there are other fields listed in the medical portion, you may click on the hyperlink to return to the appropriate tab to complete.

3. Click on the **Save (as Pending)** button. Next, you will be on the **Successful Transaction** page, where you may **Return to Record** to mark that the record is ready to certify (see Records Actions, Part 2 section).

Selected Field Notes:

Certifier Designation	Enter the Certifier designation as listed on the Certifier Worksheet (or through another means of information transmittal). A provider that pronounced death or was in attendance at the time of death, but were not part of the decedent's own health care team, should select "Certifier in Attendance at Time of Death" (Physicians) or "Nurse Practitioner in Attendance at the Time of Death." Otherwise, the certifier should choose either Physician (or Nurse Practitioner) in Charge of Patient's Care.
Physician in Charge of Patient's Care	This set of fields are enabled only when the certifier is "Certifier [or Nurse Practitioner] in attendance at time of death." The certifier should provide you with the decedent's primary practitioner. If not on the pick list, mark the checkbox **Physician not in list**. You may enter the physician's name and title (or Nurse Practitioner, if applicable). If the decedent had no primary practitioner preceding death, then mark the checkbox **No primary care physician provided**.
Nurse Practitioner - Associated Physician	For nurse practitioners that are certifying death - their Associated Physician should be selected from the pick list when applicable, and the Type of association should be selected as either "Consulting" or "Supervisory." The physician may or may not be the same as the Physician in Charge of Patient's Care.
Hour of Death	**Hour of death** may be entered as AM or PM, or as military time. Colons are not needed (e.g., 1412). If the hour of death is from 1300-2400, or 0000, then the time designation is completed as military automatically and will be converted to AM/PM for printing on the death certificate. When entering 1200, you may select "Noon" or "Midnight." Note that "midnight" (12:00AM, 2400, 0000) is considered to be the start of a new day.
Date Signed	**Date signed** is to be completed only after receiving the signed fax attestation and checking that the record is ready to certify (See Records Actions, Part 2). All medical information tabs must be complete, and the record saved, before this field becomes enabled. Dates should be entered as numeric. Dates will be converted to formal format when the record is registered and printed by the City/Town Clerk. Enter as MMDDYYYY or MM/DD/YYYY.
Date Verified	This field is disabled and is for use by RVRS only (for certificates that have been entered from paper during the grace period).

Tab 12. Records Actions, Part 2: *Ready to Certify, Certify, Informant Verification, Release to Burial Agent*

The Records Actions tab (Tab 12) is used primarily to assign a Certifier (only once, as described in Records Actions, Part 1) and to move the record through stages: to indicate a record is ready to certify in preparation for printing or faxing the Attestation Form, to indicate a record is certified upon receiving a signed Attestation Form, and to release a record to the Burial Agent upon completion of all fields. You may also use the Records Actions tab to enter comments, read comments on a record has been returned to you for correction, and view record history.

Ready to Certify

If you are entering information on behalf of an offline certifier, you will mark **Ready to Certify** prior to printing or faxing the Attestation Form. This field is disabled until all required fields in tabs 6 through 9 are completed, and the record has been validated by clicking **Finish** and **Save (as Pending)**. While this may seem to be an extra step, EDRS needs to validate all fields prior to enabling a final Attestation form. (Online certifiers will complete these steps for you).

1. Complete tabs 6 through 9; then **Finish;**
2. On the **VIPS Warning Page**, verify that only the following fields are still listed in the Medical Information section: **Physician Certifying Info - date signed**, **Medical Info - Ready to certify**, and **Certify**. If there are other medical information fields to complete, you may click on the hyperlink to return to the appropriate tab in the record. Then, **Save (as Pending)** to fully validate the record;
3. **Return to Record** on the **Successful Transaction** page.
4. Click **Ready to Certify** on the Records Actions tab, then **Finish**, and **Save (as Pending)** again.

Now, you may print or fax the **Attestation form** from the Successful Transaction page, or through the Death → Attest menu path.

Note that if there were missing fields in the medical portion of the record, you may send a **Fax Worksheet** (Preliminary Certifier Worksheet) instead, which will allow the certifier to provide you with any missing items.

Certify

Once you have received a signed and dated Attestation Form from an offline certifier, you will then certify the record on his/her behalf. If the certifier faxed the form into the VIP EDRS system, you will find the attachment on the

Certify, Informant Verification, Release to Burial Agent

Records Details screen. If the paper form was returned to you in some other manner, you should fax the Attestation Form into the VIP EDRS system first.

Retrieve the record through the **Death→New Death→Update** menu path; find the form at the bottom of the **Records Details** screen, under **Available Documents**. To ensure that the Attestation form was completed and attached successfully, view the form to verify that it was signed and dated, and that the form matches the decedent. Click **Continue**. (If the certifier did not sign and date, but instead made corrections, make the necessary corrections and follow the Ready to Certify procedure again.)

Check!! This form indicates corrections need to be made and a new Attestation form obtained prior to certification.

1. Click on **Tab 12** and check the **Ready to certify** checkbox, then go to **Tab 9** (**Certification Info**) and enter the **Date signed**.
2. Click **Next** or directly on **Tab 12** (**Records Actions**). Click on the **Certify** button, which should now be enabled.
3. **Finish** and **Save (as Pending)**. Note that the Save button will always say "as Pending" even when all items are complete.

Informant Verification - Once all personal information from tabs 1 through 5, and all information from the medical information tabs 6 through 9, are complete, it is recommended that you print an **Informant Verification form** from the Successful Transaction page (or through the menu path Death→Print) prior to releasing to the Burial Agent.

- This will allow both you and the informant to review the information in a printed format, and make any necessary corrections prior to obtaining a permit and registration of the record. You may optionally attach this with a fax cover sheet.
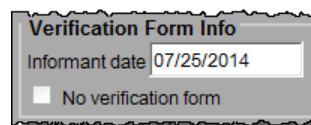
Release to Burial Agent

All required personal and medical information must be complete before releasing to the Burial Agent, regardless of whether a community is "opt-in" to ePermits or not. EDRS must validate the items prior to release.

Questions? Contact the Registry of Vital Records and Statistics at vip@state.ma.us.

Once all items are complete, including all required fields and tabs, the Certify button, and the Informant verification section:
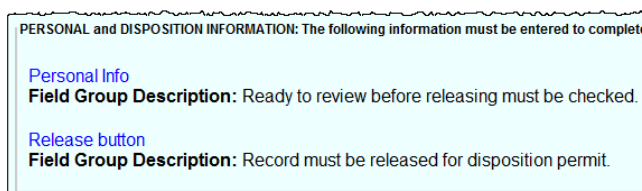
1. If an Informant verification form was signed, enter the **Informant date**. If not, mark "**no verification form**."

2. On the **VIPS Warning Page**, you should have only two warnings: **Personal Info** and **Release button**. If there are others, click on the hyperlink(s) to complete those items. You must then **Save (as Pending)** to allow the EDRS system to fully validate the record.

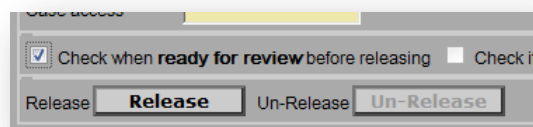   **Verification Form Info**
   Informant date 07/25/2014
   ☐ No verification form

   PERSONAL and DISPOSITION INFORMATION: The following information must be entered to complete

   Personal Info
   Field Group Description: Ready to review before releasing must be checked.

   Release button
   Field Group Description: Record must be released for disposition permit.

3. On the Successful Transaction screen, click **Return to Record** (or find the record later through the queue or menu path Death→New Death→Update).

4. On tab 12 (the Records Actions tab) mark the checkbox **Check when ready for review before releasing**.

   ☑ Check when **ready for review** before releasing   ☐ Check if

   Release [**Release**]   Un-Release [Un-Release]

5. Then, when you have completed all fields and steps, click the **Release** button when you are ready to send the record to the burial agent, **t**hen, **Finish**.

Upon release to the burial agent, it is recommended that family designees obtain the permit from the burial agent, such that their plans for disposition can be discussed. However, if you will be printing the permit, when you are able to print will depend on whether your community is "opt-out" or "opt-in" to ePermits:

- If opt-out, the record is now in the Pending Permit queue for the burial agent to review and issue local permit information. After the burial agent enters permit information, you will be able to print the permit from EDRS.

- If opt-in, you may print the permit immediately. The record is also in the Pending Permit queue for the burial agent to review and issue local permit information, but this can occur after you print your ePermit.

Verification Form Info, Release to Burial Agent

Permits, Searching, Faxing

Print Permit

To print a permit, navigate through the menu path Death→Print→Permits. Enter search criteria, including city/town of death occurrence.

- If the record cannot be found, that means a city/town is opt-out and has not yet issued the permit.
- If opt-in, the record will be found immediately after you release to the burial agent and an ePermit may be printed.
- If opt-out, the record will be found once the burial agent has completed the permit information on the decedent's record.

The permanent copy of the permit (that will be signed and returned by the place of disposition) must be printed on archival-quality bond paper.

Searching for a Record

For any search, enter at least a few fields to narrow down the search. This will help EDRS find the record easily and improve system performance for all users.

Enter at least a few fields to narrow the search. This will improve system

Permits - You must enter the city/town of death occurrence in the search criteria when you are printing disposition permits

Soundex will help find last names that sound alike but are spelled differently. If you are not sure if the decedent's last name is Smith or Smythe, check the

Click on Details to bring up the Records Details screen, where you can verify that the record or form that you about to retrieve is the

Faxing

Fax attestation forms and preliminary certifier worksheets do not require cover sheets. For all other documents and evidence, a fax cover sheet must be printed (such as nurse pronouncement forms). Fax documents to **1-617-887-8739**, which is an automated imaging system that attaches a PDF to the electronic record. (This "fax" never arrives at an office fax machine, and the image can only be viewed by authorized EDRS users).

Questions? Contact the Registry of Vital Records and Statistics at vip@state.ma.us.